BP006 Employee Action Summary

Report Description:

This report shows employee action count summary by Personnel Area, Organizational Unit, Action Type for a specified Effective Date range or Processed Date range and includes BEACON actions and converted PMIS actions.

Report Location:

PA: Employee Actions

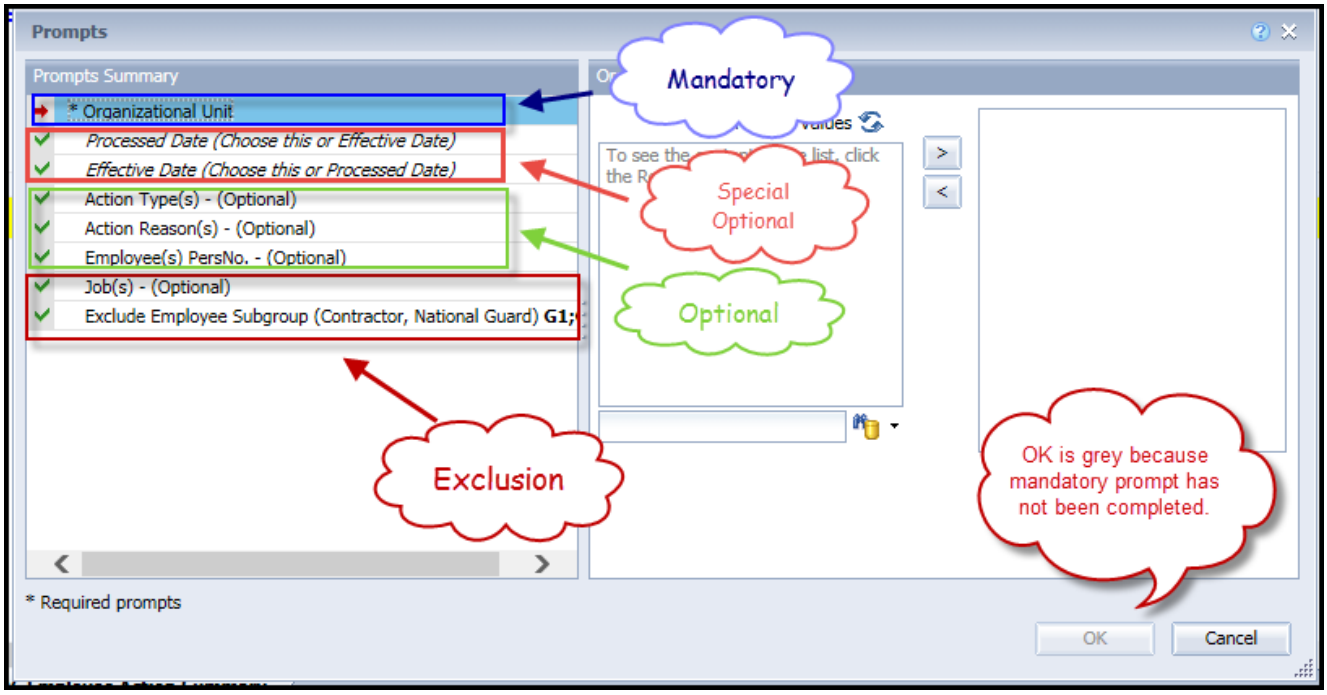
Report uses:

- Provide action count to management
- Monitor action activity by Org Unit for trending and analysis

Quick Links

How to run this report 2
Mandatory Prompts 2
Special Optional Prompts: 3
Optional Prompts 4
Exclusion Prompts: 7
Initial Layout 7
Available Objects: 8
Special Report Considerations/Features: 9

How to run this report

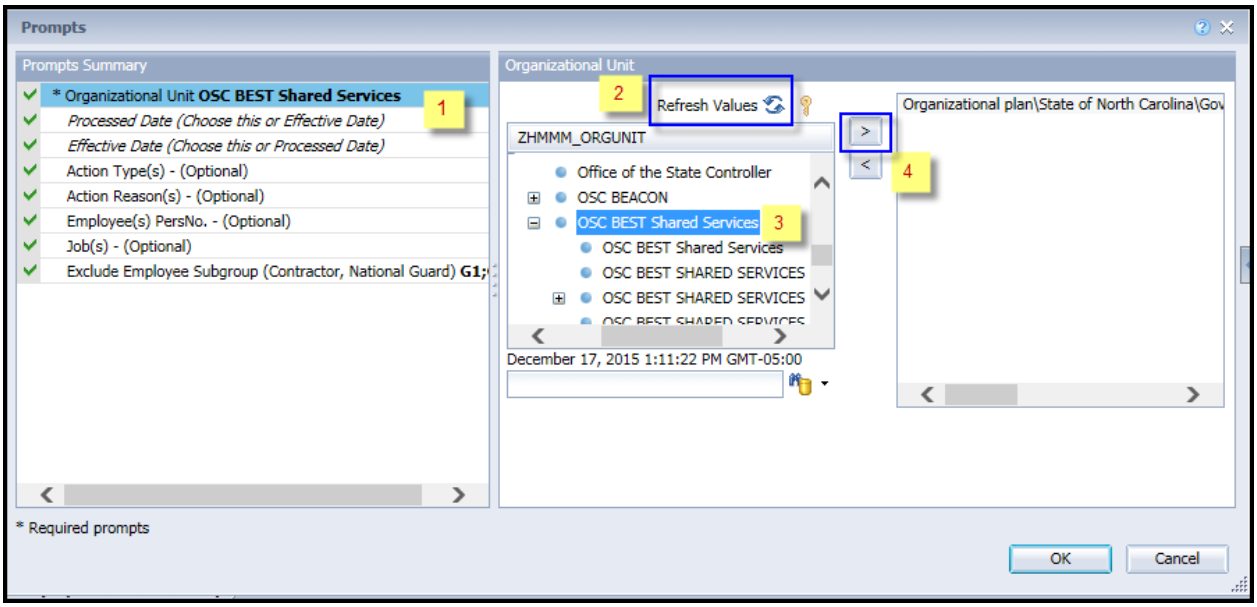


Mandatory Prompts

Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

➔ ***Organizational Unit:** To select data for this prompt:

- Make sure you have "Organizational Unit" prompt selected (1).
- Click on the "Refresh Values" icon to see the list of Org Units (2).
- Navigate down to the desired Org Unit (3).
- Click on the right arrow to add it to the selection box (4).



IMPORTANT!

Special Optional Prompts:

Special Optional prompts are indicated with a green check mark (✓) but are not pre-filled. These prompts are designed as a group. You may use either prompt but ONE prompt from this group must be answered.

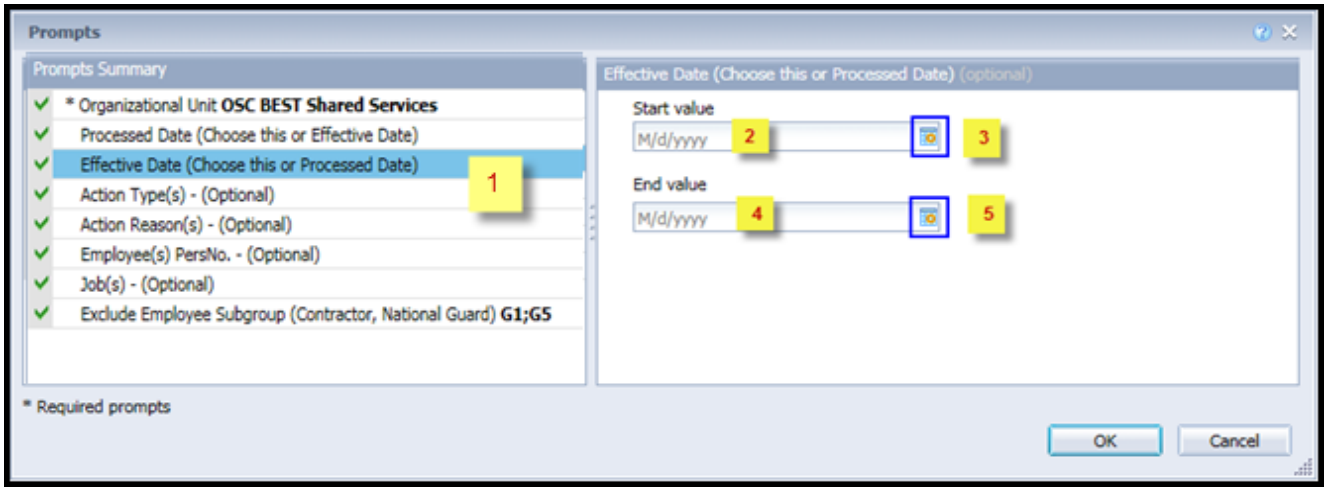
- ✓ **Processed Date (Choose this or Effective Date)**

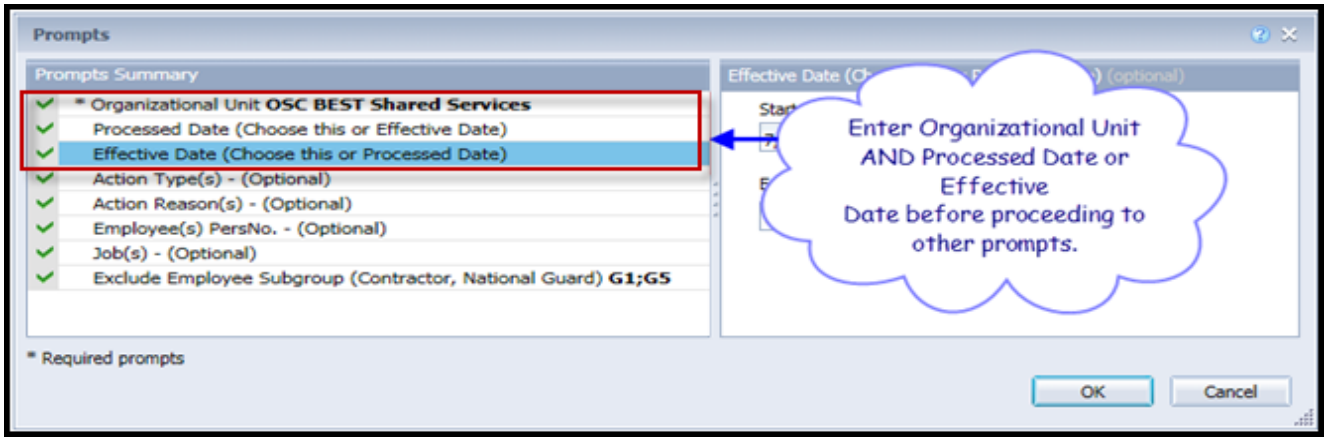
  OR

- ✓ **Effective Date (Choose this or Processed Date)**

  One of these 2 prompts must be selected:

  - Select the prompt field first (1).
  - Type in the Start date (2).
  - OR click or click on the calendar icon to select the Start date (3).
  - Type in the End date (4).
  - OR click or click on the calendar icon to select the End date (5).



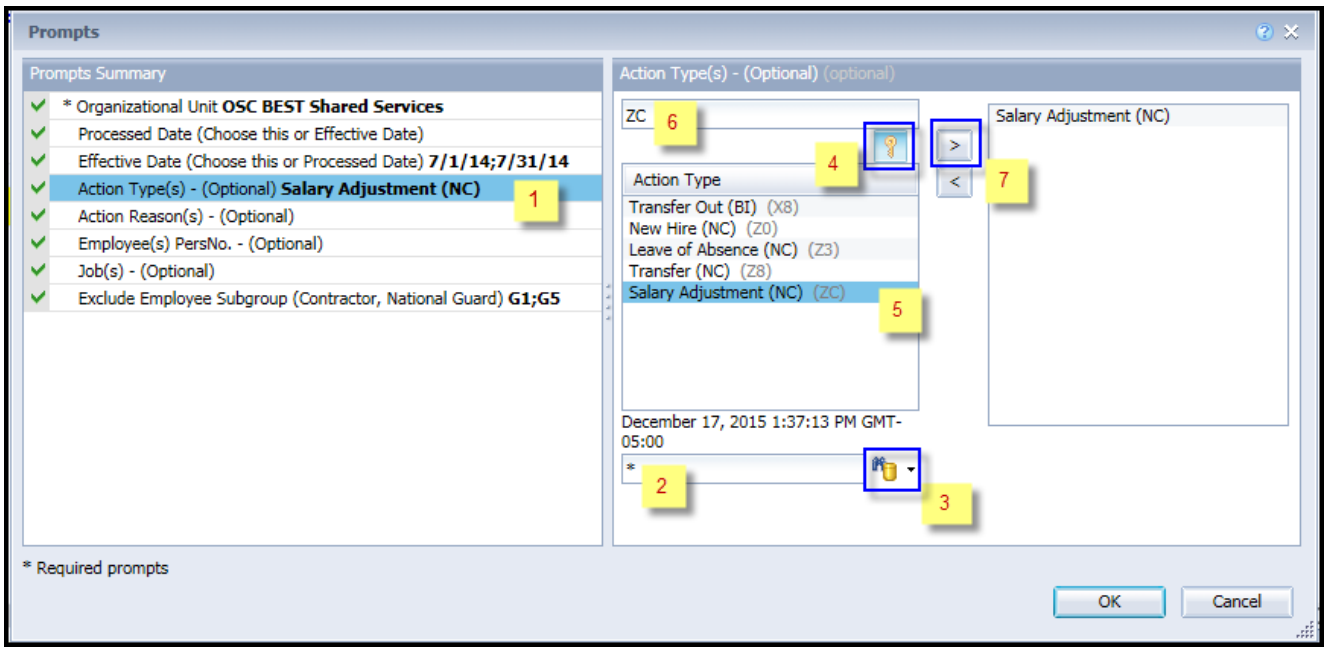


Optional Prompts

Optional prompts are indicated with a green check mark (✓) and are not required. They are used to assist in further limiting the amount of data that is retrieved into the body of the report.

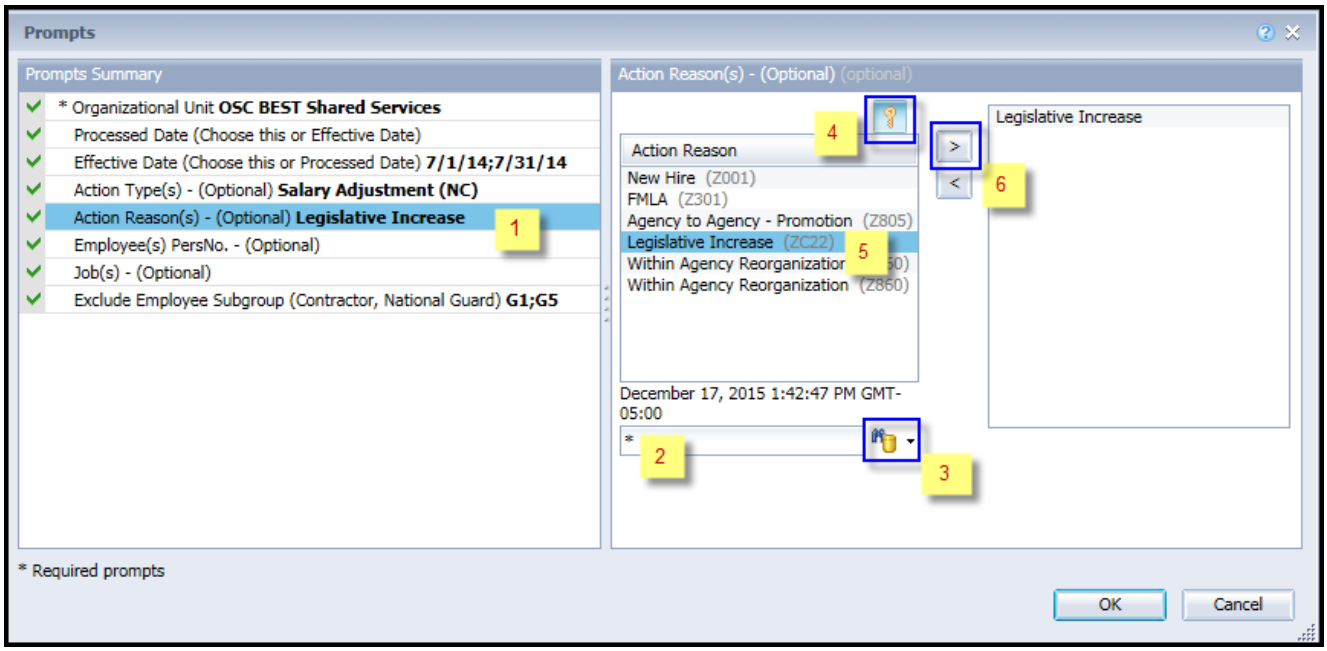
✓ **Action Type(s) - (Optional):** To select data for this prompt:

- Make sure the "Action Type(s) - (Optional)" prompt is selected (1).
- Enter a search text with an asterisk (*) in the search box to view the list of values for Action Type (2).
- Click on the search icon (3).
- To see the key value for each Action Type, click on the key icon (4).
- Click on the desired Action Type (5).
- OR if you know the Action Type key or Action Type name already, then you can skip steps 2 through 5 and enter it directly in (6).
- Click on the right arrow to add the Action Type to the selection box (7).

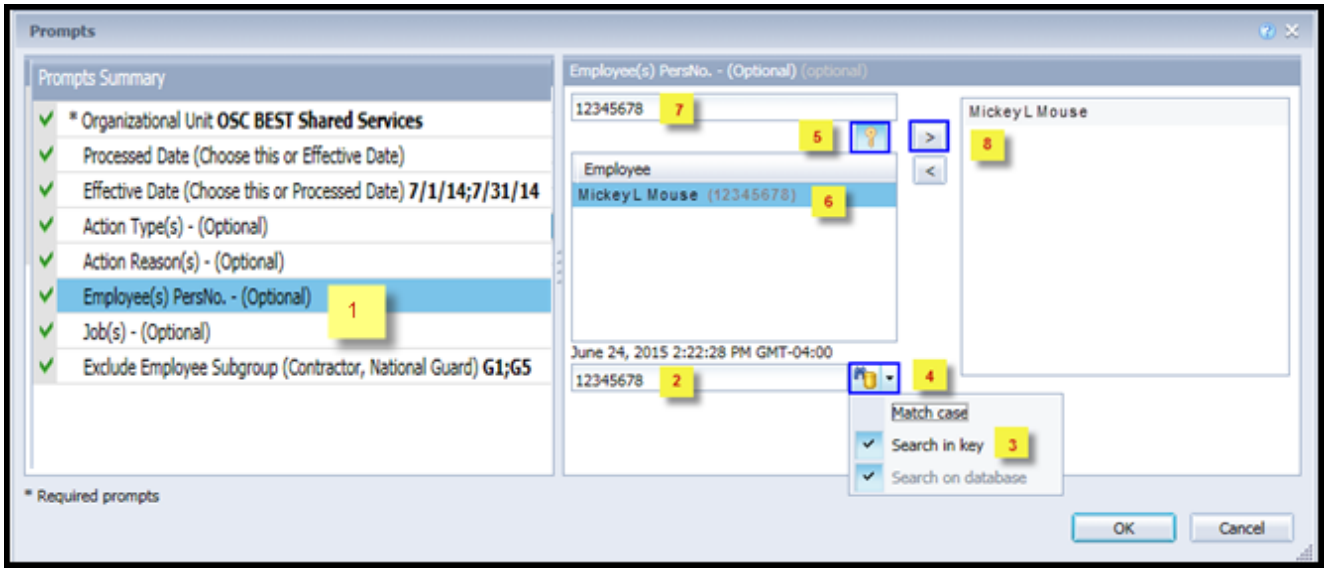


✓ **Action Reason(s) - (Optional):** To select data for this prompt:

- Make sure the "Action Reason(s) - (Optional)" prompt is selected (1).
- Enter a search text with an asterisk (*) in the search box to view the list of values for Action Reason (2).
- Click on the search icon (3).
- To see the key value for each Action Reason, click on the key icon (4).
- Click on the desired Action Reason (5).
- Click on the right arrow to add the Action Reason to the selection box (6).

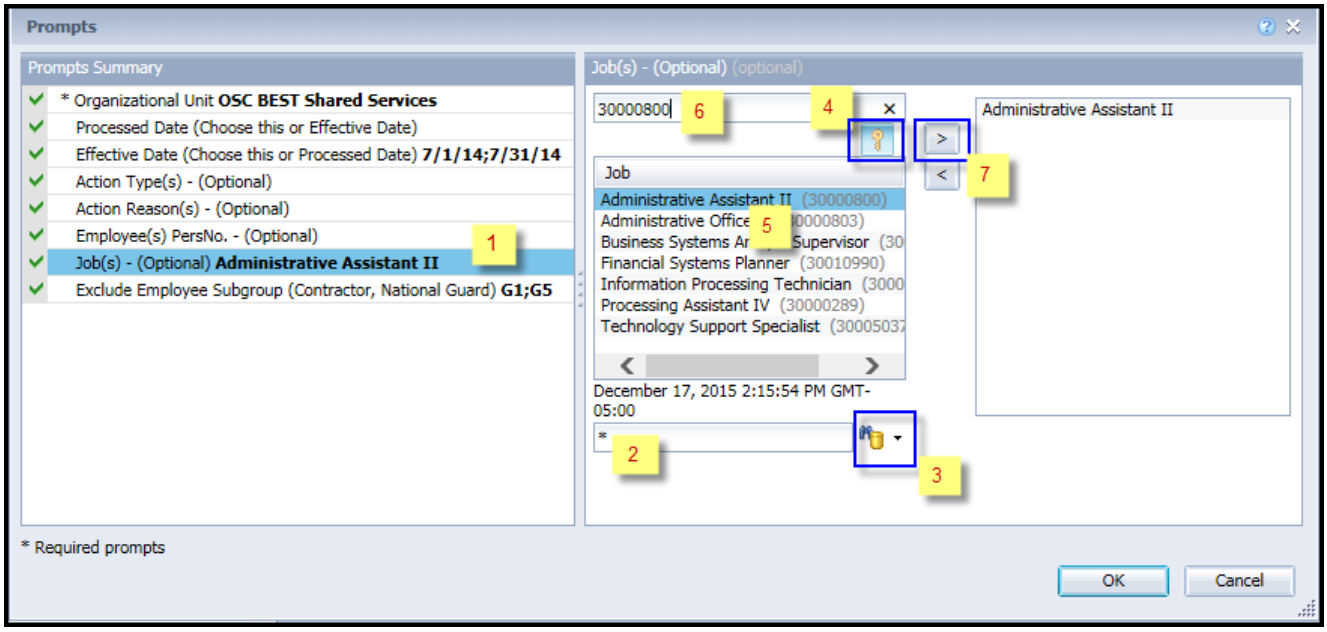


- ✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
  - Make sure the "Employee(s) PersNo. - (Optional)" prompt is selected (1).
  - Enter an employee number in the search box to verify the employee name (2).
  - Click on the search icon drop down arrow and select "Search in key" (3).
  - Then click the search icon (4).
  - To see the employee number, click on the key icon (5).
  - Click on the desired Employee (6).
  - OR if you do not need to verify the employee number, then you can skip steps 2 through 6 and enter it directly in (7).
  - Then click on the right arrow to add the Employee to the selection box (8).



✓ **Job(s) - (Optional):** To select data for this prompt:

- Make sure the "Job(s) - (Optional)" prompt is selected (1).
- Enter a search text with an asterisk (*) in the search box to view the list of values for Jobs (2).
- Click on the search icon (3).
- To see the key value for each Job, click on the key icon (4).
- Click on the desired Job (5).
- OR if you know the Job number or Job name already, then you can skip steps 2 through 5 and enter it directly in (6).
- Click on the right arrow to add the Job to the selection box (7).



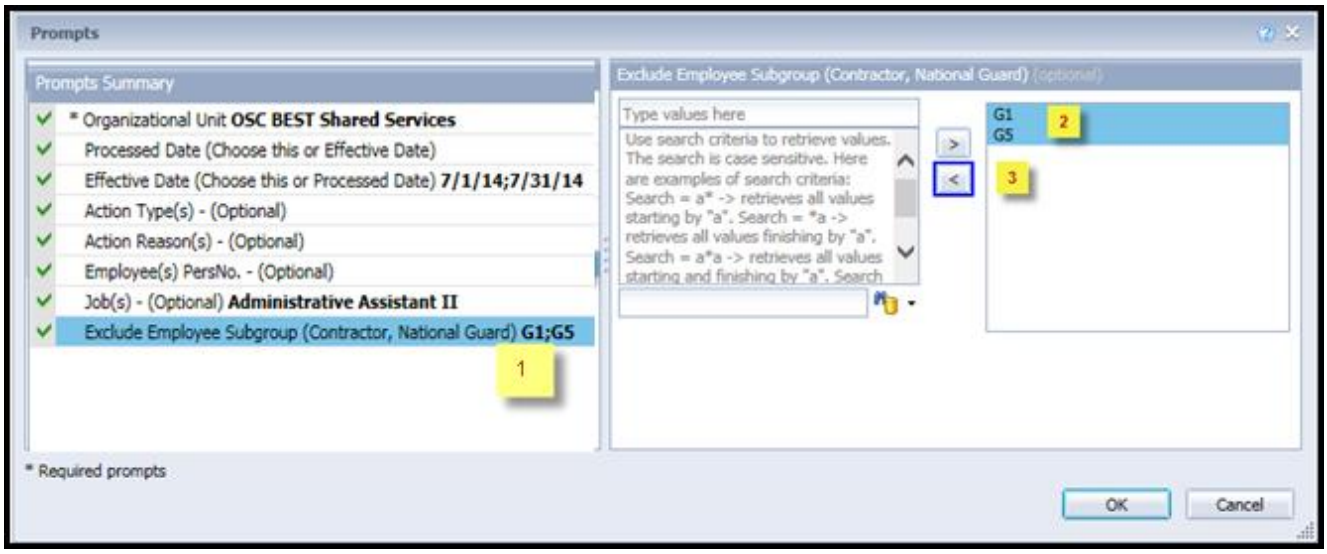
Exclusion Prompts:

Exclusion prompts are also indicated with a green check mark (✓) but are generally prefilled with a specific set of data values. They are provided as a way to exclude specified data by default while allowing customers the flexibility of changing them when necessary. Any rows containing data values listed in the exclusion selection box will not be fetched into the report.

- ✓ **Exclude Employee Subgroup (Contractor, National Guard) G1; G5**

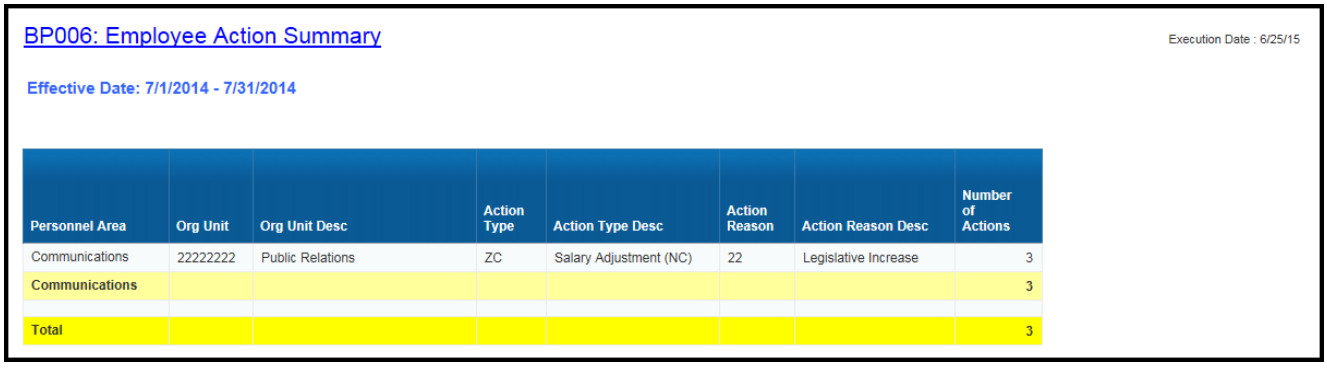
  To remove this exclusion

  - Make sure the "Exclude Employee Subgroup" prompt is selected (1).
  - Click on one or more Employee Subgroup(s) to remove from the 'Selected Value(s) box (2).
  - Click on the left arrow icon to remove the desired Employee Subgroup(s) (3).



Initial Layout

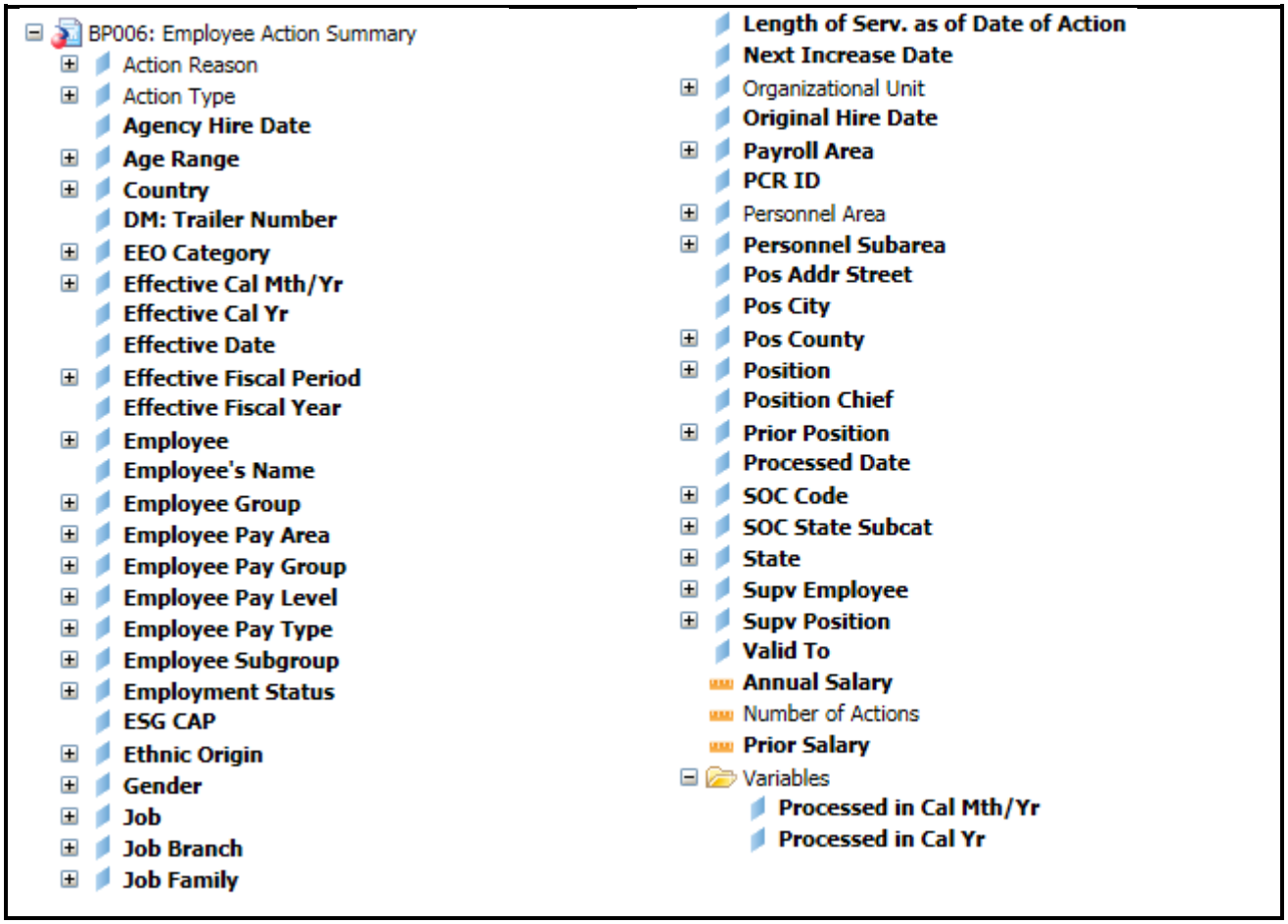
The report lists all actions based on the prompt selections. Below is a sample of the initial layout rendered.



Personnel Area	Org Unit	Org Unit Desc	Action Type	Action Type Desc	Action Reason	Action Reason Desc	Number of Actions
Communications	22222222	Public Relations	ZC	Salary Adjustment (NC)	22	Legislative Increase	3
Communications							3
Total							3

Available Objects:

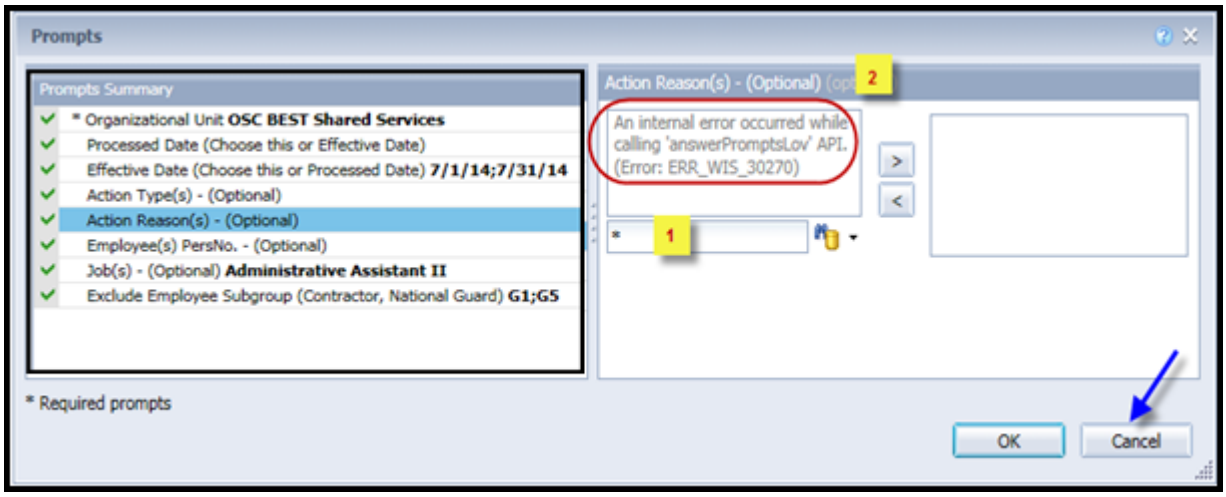
This is a list of the available objects that can be added to the report, once in Design mode:



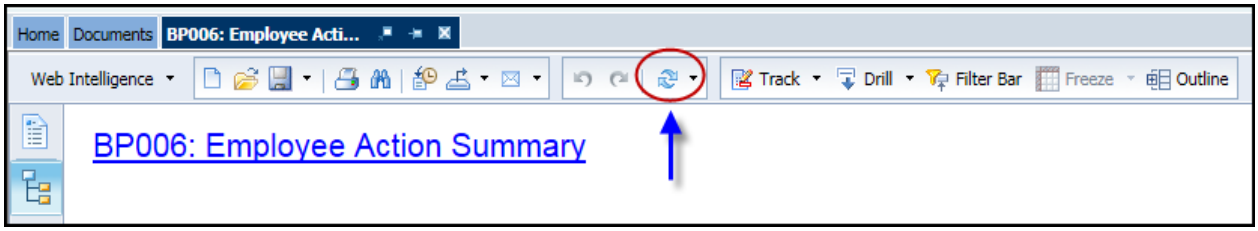
Special Report Considerations/Features:

- Action records in PMIS have been converted to the SAP BEACON action code equivalent for employee actions. Where no equivalent was available for an employee action, a Z# or X# employee action type was generated using the original PMIS action description.
- If one or more completed PCRs exist for an action, the "Processed Date" available object is populated with the date from the most recent processed PCR action. If no completed PCR exists for the action, the Processed Date is populated with the "Changed on" date from the action infotype.
- If you search on one of the optional fields without entering Organizational Unit AND one of the required dates (Processed Date or Effective Date) (1), the following error will occur (2).

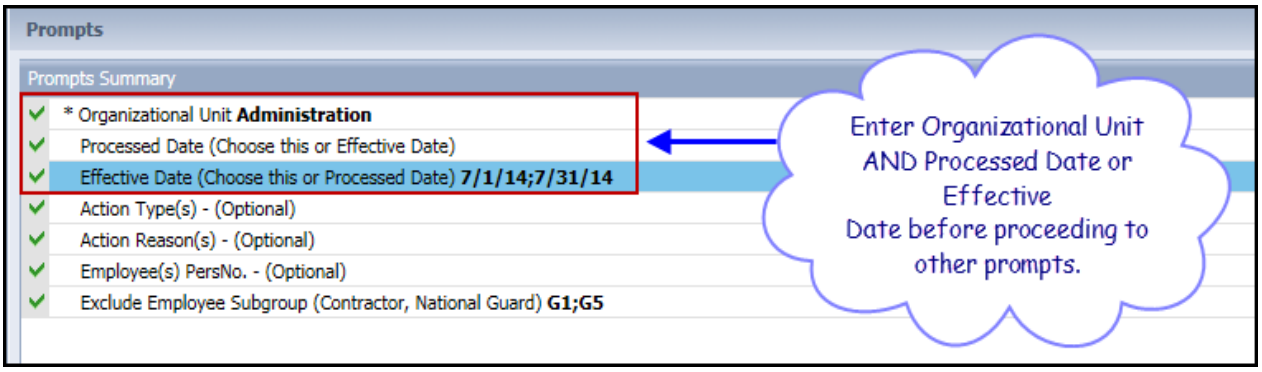
Once this error occurs, even if you go back to fill in one of the required date prompts, and then do a search (1), you will then get the following error (2).



You must click on 'Cancel' and start over by clicking on the 'Refresh' icon within the report screen.



Make sure that Organizational Unit AND one of the date prompts (Processed Date or Effective Date) is entered before proceeding to any of the other prompts.



Change Log:

Effective 3/25/2015 Initial version, completed in pilot.
Effective 12/10//2015 Add job prompt.
Effective 1/4/2016 Add job min/max and reference salaries to job attributes.
Effective 12/16/2016 Add age to available objects.
Effective 12/2017 • The Processed Date available object was modified to be populated with the date from the most recent processed PCR action from the completed PCR. If no completed PCR exists, the Processed Date is populated with the "changed on" date of the action.